



United Way
Hastings &
Prince Edward

2025/26
APPLICATION
GUIDELINES &
SUPPLEMENTARY
FUNDRAISING
POLICIES

A tool to assist with determining eligibility, strategic fit, and completion of the Community Impact Fund application. This document also outlines United Way Hastings & Prince Edward's supplementary fundraising policies.

For important funding details, please be sure to review our website which can be found at <https://unitedwayhpe.ca/funding/>

Introduction

United Way Hastings & Prince Edward is a highly successful and trusted fundraising organization that strives also to achieve meaningful, long-term improvements to the quality of life in our communities. Our goal is to help make fundamental changes to community conditions while continuing to provide support through annual fundraising campaigns.

In 2024-2025, the communities of Hastings & Prince Edward Counties helped United Way Hastings & Prince Edward raised over \$2.25 million which assisted the organization in funding more than 48 local programs and initiatives throughout Hastings & Prince Edward Counties.

Our Mission

Through caring and generosity, we improve lives and build a stronger community for all

Our Vision

Everyone in our community has the opportunity to reach their full potential

Our Values

Demonstrate trust, integrity, respect, inclusivity and transparency

Energize and inspire volunteerism and volunteer leadership

Endorse innovation, partnerships and collective action

Provide non-partisan leadership

Embrace diversity

Background to Community Impact Strategy

In 2022 United Way Hastings & Prince Edward re-engaged with our community to deepen our understanding of how people experience life here and how that experience may be different now than it was pre-pandemic; in the spirit of 'nothing about us without us' we listened to and learned from people from all walks of life, with different experiences and different perspectives. This learning, paired with data, has informed the development of a community impact strategy that will guide our work moving forward. It will inform how we invest in programs and services locally, how we will mobilize the power of the people who live here, how we will advocate for change, how we will collaborate and how we will continually learn about what matters most to the people who call our community home.

Our community impact strategy is guided by our organization's vision, mission and values and has been developed with input from our community, agency partners, donors and volunteers. This strategy builds on the United Way Centraide Canada National Focus Area Frameworks (2014) and United Way HPE's previous impact strategy developed in 2014.

Strategies

United Way is committed to creating measurable, long-lasting change. To do that we challenge ourselves to see the bigger picture and then mobilize the collective power of our community to address the most complex social issues. But we don't do it alone.

How we do it:

- **Advocate** – work with government, community planners, community service partners, and decision-makers to shape social policy championing solutions that improve people's lives.
- **Invest** – make smart, strategic investments in local programs and services that get results and create lasting, measurable change.
- **Mobilize & Collaborate** - maximize the collective power of the social sector, donors, governments, business, volunteers and the community as a whole by mobilizing effective, collaborative approaches to community conditions. Bringing diverse voices to the table helps us build strong strategies for community change.
- **Fundraise** - fundraise, leverage grants, government funding and other resources to create positive community impact and change.
- **Build Capacity** – provide access to resources, learning opportunities, research, and data to enable community and organizational planning and development.

Guiding Principles

United Way Hastings & Prince Edward has five principles that will guide our decisions, work and processes.

Focused	United Way HPE supports strategies that align with its priority focus areas based on in depth community research. Investments are open to all organizations that meet current eligibility requirements and that demonstrate their work aligns with the impact agenda. Collaborative work and advocacy align with the priorities that have been identified for the community by the community.
Equitable, Diverse and Inclusive	For a community to be great, it must be great for everyone and everyone must be able to find themselves represented. We are committed to creating an inclusive community by: <ul style="list-style-type: none">• Supporting agencies and programs to celebrate diversity and be equitable and inclusive• Developing increased capacity of the community and agencies through workshops, training, and opportunities to share• Growing diversity on board, staff, and volunteer groups• Creating space for diverse voices to be heard
Balanced	United Way HPE supports programs and services across our region that are proactive & preventative targeting the root cause of issues. We also understand that long-term strategies don't solve the challenges of a person facing immediate crises so we also support interventions that respond to acute needs. We strive to balance our support geographically to support each community with the programs and services they need.

Impactful	Community investments support strategies that focus on measurable results that are proven to build a stronger community. We collect, analyze, track and share information on these results. Small grants allow for programs to innovate and create solutions through pilots
Accountable	<p>United Way HPE is a proud steward of donor dollars. We are accountable to our partners, donors, stakeholders and to the community at large. We will invest in programs and services where the agency can demonstrate:</p> <ul style="list-style-type: none"> • Strong and transparent accountability • Sustainability and viability • Financial need for support

Basic priorities, long-term and short-term outcomes are shown below in the detailed **Guidance letters** for each pillar, inclusive of indicators for measurement and basic descriptions of the programs and services that United Way Hastings & Prince Edward will fund within each of the priorities. Guidance letters will serve as a tool in the evaluation of submissions through the citizen review process and the evaluation rubric is included for agencies reference. Please carefully review the Guidance Letters prior to completing an application.

Helping kids be all they can be

Long Term Outcome

Children and youth have the support they need to get a great start in life, do well in school and reach their full potential

Short Term Outcomes

- Increased mental health and healthy development supports/services for children, youth & their families
- Access to substance use/misuse & addiction support for children and youth
- Access to accessible, safe, inclusive recreational opportunities and spaces for youth
- Increased opportunities that develop life skills and support school success
- Increased mentorship, leadership, and community engagement opportunities

Assessment Criteria

- Outputs - units of service, and # of unique people served
- Demographics - geographical area served, target population
- Need - the program clearly demonstrates the need in the community that they are responding to (using data/evidence)
- Activities - the program identifies key program activities that are relevant to the achievement of the outcome,
- Measures of Success - the program identifies relevant indicator(s) of success and how the indicator(s) will be measured and reported
- Budget - the budget is realistic for the achievement of the outcome and the agency demonstrates a need for United Way investment
- Organizational Capacity - the program aligns with the mission of the organization and the agency demonstrates sustainability, viability and appropriate capacity needed to successfully achieve the program outcomes
- Collaboration - the program identifies effective partnerships and collaborations that foster the achievement of the program outcome

Sustainable Development Goal Alignment



Moving people from poverty to possibility

Long Term Outcome

To meet the basic needs of our community's most vulnerable people, giving every person the opportunity to realize a better future

Short Term Outcomes

- Increase access to supportive, transitional and/or affordable housing
- Decrease homelessness and/or increase homelessness supports
- Increase food security and access to emergency food supplies
- Increase employment related skills, services and training for people who are unemployed or under-employed
- Increase access to affordable healthcare and wellbeing supports
- Increase access to affordable child care supports for families

Assessment Criteria

- Outputs - units of service, and # of unique people served
- Demographics - geographical area served, target population
- Need - the program clearly demonstrates the need in the community that they are responding to (using data/evidence)
- Activities - the program identifies key program activities that are relevant to the achievement of the outcome,
- Measures of Success - the program identifies relevant indicator(s) of success and how the indicator(s) will be measured and reported
- Budget - the budget is realistic for the achievement of the outcome and the agency demonstrates a need for United Way investment
- Organizational Capacity - the program aligns with the mission of the organization and the agency demonstrates sustainability, viability and appropriate capacity needed to successfully achieve the program outcomes
- Collaboration - the program identifies effective partnerships and collaborations that foster the achievement of the program outcome

Sustainable Development Goal Alignment



Building strong and healthy communities

Long Term Outcome

To support personal well-being and strengthen communities & neighbourhoods so everyone experiences a sense of belonging and connection to one another

Short Term Outcomes

- Accessible supports for mental health, wellbeing, and personal safety
- Increased accessible, affordable transportation to support employment, recreation, and access to life's basic needs
- Increasing personal safety, education, and awareness around technology
- Increasing access to inclusive spaces for adult and senior socialization and recreation reducing isolation
- Increasing caregiver supports
- Raising awareness of, supporting the navigation of, and increasing access to programs and services that support personal well-being, including advocating for income entitlements.

Assessment Criteria

- Outputs - units of service, and # of unique people served
- Demographics – geographical area served, target population
- Need - the program clearly demonstrates the need in the community that they are responding to (using data/evidence)
- Activities - the program identifies key program activities that are relevant to the achievement of the outcome,
- Measures of Success - the program identifies relevant indicator(s) of success and how the indicator(s) will be measured and reported
- Budget - the budget is realistic for the achievement of the outcome and the agency demonstrates a need for United Way investment
- Organizational Capacity - the program aligns with the mission of the organization and the agency demonstrates sustainability, viability and appropriate capacity needed to successfully achieve the program outcomes
- Collaboration - the program identifies effective partnerships and collaborations that foster the achievement of the program outcome

Sustainable Development Goals



Community Impact Fund Process and Timeline

Agencies interested in applying for funding must complete United Way Hastings & Prince Edward's online Request for Investment Process.

An orientation session will be offered to applicants – they are not mandatory, but available to assist you as you move through the application process – please watch our website for dates and times.

All proposals that are complete and submitted on time will be reviewed by United Way Hastings & Prince Edward staff before being forwarded to a citizen review committee. Citizen review teams, guided by United Way Hastings & Prince Edward staff and using standard scoring tools will make funding recommendations to our board of directors.

Timelines

- | | |
|--|----------------------|
| • Application open | October 13, 2025 |
| • Training session | October 22, 2025 |
| • Application due | November 28, 2025 |
| • Citizen Review | Dec. – Feb. 2026 |
| • Interviews, site visits and/or Q&A with applicant agencies | Jan. – Feb. 2026 |
| • United Way HPE Board Approval of funding | February 17, 2026 |
| • Funding decisions emailed to applicant agencies | End of February 2026 |

Policies

- **Reserves** - Amount equal to 90 days operating expenses or greater than 25% of the total annual operating budget
- **Financial Statements** - agencies MUST submit independently produced LOCAL financial statements for the most current fiscal year end as referenced in the funding application. They can be in the form of an audit or review engagement
- **Annual Budget** - United Way HPE will not allocate an amount that represents more than 50% of the funded agencies total annual operating budget
- **Deficits** - Agencies require accurate financial projections as these projections can significantly influence a determination or need for individual organizations. United Way HPE may, at the discretion of the Board of Directors appropriately reduce or adjust funding in the event a deficit, reoccurring or projected, is identified.

Eligibility Requirements

Every application organization must complete a Pre-Qualification as part of the online application to ensure compliance with criteria. Basic eligibility for United Way Hastings & Prince Edward includes, but is not limited to, the following.

- The agency must align with United Way Hastings & Prince Edward Community Impact Strategy and,
- The organization provides services to residents of Hastings County and/or Prince Edward County and
- A volunteer Board of Directors governs the agency and,
- The agency provides audited annual financial statements (or a review engagement) and,
- The agency is sustainable, stable, and strong, and,
- The organization complies with the Ontario Human Rights Code in its service delivery, employment practices and volunteer board leadership and,
- The organization aligns with United Way Hastings & Prince Edwards mission, vision and values statements and with UWHPE's guiding principles.
- The organization must be a qualified donee under Canada Revenue Agency, - (please note, this will change to include the new directives for funding non-qualified donee's as per Canada Revenue Agency)

United Way Hastings & Prince Edward does NOT fund:

- For-profit organizations
- Programs that include the advancement of religion in the delivery of United Way funded programs or services
- Organizations that do not comply with the Ontario Human Rights Code in its service delivery, employment practices and volunteer board leadership. Organizations must not weaken or limit the ability to exercise rights legally protected in Canada.
- Organizations that are primarily political in nature
- Foundations, unions, professional associations or organizations that are primarily fundraisers
- The arts
- Regulated health professionals (see listing at: <https://www.ontario.ca/page/regulated-health-professions#section-1>)
- Medical research, hospitals and long-term care facilities
- Costs for major capital equipment or expenses that relate to the construction of new buildings, renovations to existing buildings or the purchase of office equipment or furniture that does not have a direct relation to program delivery
- Hospitals or medical treatment programs
- Educational institutions and organizations, including school boards, schools, universities, colleges and parent-teacher associations

United Way Hastings & Prince Edward relationship with funded partners

The pledged allocation is to be dispensed in twelve equal monthly instalments for the single funding year.

United Way Hastings & Prince Edward reserves the right to withhold monthly instalments should governance, stewardship or program delivery at the funded agency be compromised.

The funded partner understands and agrees that the payment of any of the Funding under this Agreement is subject to the availability of funds from United Way HPE. Payment of any of the Funding may be cancelled or reduced in the event that United Way HPE is unable to meet the financial obligation due to unforeseen circumstances.

Program Funding – (minimum funding request of \$5,000)

United Way HPE has long funded programs delivered by not-for-profit charitable organizations in the community that move the needle on pressing social issues and conditions. This funding enhances an organization's ability to implement a specific program that has measurable impact through proven outcomes, data and statistics.

The Application Process

All annual requests for funding will be completed on the e-CImpact online application system. To access the application please click [HERE](#) If you are currently funded by United Way HPE, please use your login and password. If you are applying for the first time, please create an account. A detailed Agency training manual on the application system itself can be accessed [HERE](#)

Program Funding

There are 3 separate sections to the Program Funding application: agency information forms, mandatory agency documentation to be uploaded, and Program funding information forms.

Agency information forms:

- Pre-Qualifications
- Agency Information
- Governance

Documentation to upload:

- Board of Director listing (Excel download)
- Current Annual Report or most recent AGM (If you do not have a Current Annual Report or a recent AGM, please upload a document with an explanation of why.)
- Current Audited financial statements (mandatory)
- Strategic Plan (If you do not have a Current Annual Report, please upload a document with an explanation of why.)
- Agency Financial Picture (Excel download)

The Agency Financial Picture and the Board of Director listing requires that agencies download the Excel template from the e-CImpact Resource Centre, complete the form as required, and upload the final information into our document uploads area. For any questions about this or other upload requirements, please contact Kaitlyn Lalonde: klalond@unitedwayhpe.ca

Program Funding information forms (Please note: These forms will only appear once a program has been added to the application for the first time):

- Program Information
- Program Details
- Units of Service
- Program Success Story
- Program Statistical Information
- Program Financial Information
- Budget Variance Explanation
- UWHPE CI Strategy Alignment

APPENDIX A

SAMPLE INDICATORS

Please note, these documents are intended to be used as a resource for agency application completion.

Helping kids be all they can be

- Self-reported or observed commitment to learning and achievement
- Demonstrated mastery of age-appropriate literacy skills
- Demonstrated mastery of age-appropriate numeracy skills,
- Demonstrated Improved grades
- Demonstrated successful on time graduation
- Demonstrated readiness to transition to post-secondary education or training
- Demonstrated success in transitioning to meaningful employment
- Increased parent/caregiver engagement in children's school experience
- Improved readiness in children entering the school system
- Increased opportunities for early learning
- Improved/Increased sense of belonging
- Increased supportive relationships
- Demonstrated improvement in peaceful conflict resolution skills
- Positive change in constructive use of time and/or meaningful participation in activities
- Demonstrated improvement in pro-social behaviours
- Increased sense of connectedness to community
- Strengthened parenting capacity
- Increased access to parenting resources and supports
- Positive development of interpersonal skills,
- Positive development of healthy relationships
- Improved coping skills
- Improved skills in planning and decision making
- Increased leadership skills
- Improved positive identity and self-esteem
- Strengthened sense of purpose and optimism
- Increased physical activity
- Healthier life choices
- Increased places for children to play in safe environments
- Introduction to new opportunities and interests that broaden a child's experience

Moving people from poverty to possibility

- Increased capacity to sustain safe and stable housing
- Reduced risk of eviction and/or homelessness
- Increased access to transitional housing
- Increased access to safe, affordable, permanent and/or appropriate housing
- Increased affordability and availability of healthy food;
- Increasingly food is shared and distributed to those who need it
- Decreased stress and life disruptions due to food insecurity
- Increased access to affordable, accessible, reliable transportation options
- Increased supports that help families successfully navigate the social system
- Increased access to resources and supports in rural areas or vulnerable neighbourhoods through unique service delivery models
- Increased connections to available jobs or relevant training
- Increased literacy skills/improved job readiness skills
- Increased supports to achieve family sustaining income
- Improved access to entitlements, benefits and other income supports
- Increased access to low-cost childcare for employment or education
- Increased access to low-cost services to enable employment or education
- Increased coordination between services working with people with low income to ensure the impacts of poverty are lessened for families
- Improved planning between multi-sectors/services at the community level to measurably reduce poverty for local families
- Improved planning between multi-sectors/services at the community level to reduce the impact of poverty on local families

Building strong communities

- Increased ability to live independently
- Improved ability to make healthy choices
- Improved self-esteem/Increased confidence,
- Improved sense of purpose or life satisfaction
- Increased coping skills/Improved problem-solving skills
- Increased positive management of emotions
- Increased personal safety from harm or violence
- Increased sense of belonging/ Increased inclusion in the life of the community
- Increased volunteerism/ Improved participation in community events
- Development of new and/or maintenance of relationships that improve or increase informal support systems
- Increased access to resources and supports in community and neighbourhoods through unique service delivery models
- Increased access to information for supports and services/ Increased awareness of supports and services

APPENDIX B

FUNDED AGENCY AGREEMENT & SUPPLEMENTAL FUNDRAISING AGREEMENT

Please note, these documents are intended to be used as a resource – United Way HPE reserves the right to modify the agreements prior to the funding year beginning April 2026.

Investment agreement

Parties to the Agreement:

«Agency Name» and United Way Hastings & Prince Edward (“UWHPE”):

Amounts, Terms and Conditions *

United Way HPE pledges to provide the following investment according to these terms and conditions:

United Way will provide funding in equal monthly installments for the term of the grant, conditional upon subsequent campaign results and agency achieved outcomes as demonstrated in the required submission of progress reports. The funded partner understands and agrees that the payment of any of the Funding under this Agreement is subject to the availability of funds from United Way HPE. Payment of any of the Funding may be cancelled or reduced in the event that United Way HPE is unable to meet the financial obligation due to unforeseen circumstances.

A. United Way HPE also agrees to:

1. Identify as a funded partner and promote funded programs and initiatives through a variety of channels, including but not limited to: United Way’s online listing of Priority Goal Program Investments, campaign materials, Story Bank and Seeing is Believing tours, as appropriate.
2. Provide support and information on the benefits and expectations of this funding relationship through an Orientation Session and/or ongoing communications.
3. Consult and provide guidance with respect to program evaluation, revenue generation and fundraising, upon request (when feasible).
4. Ensure regular and timely communications with funded priority goal partners on any matter that may affect the partnership or terms of the agreement.

B. «Agency Name» agrees to the following conditions and policies:

1. Implement the funded program(s) or projects(s) as outlined in the approved proposal and notify United Way HPE immediately of any changes to the program agreed upon outputs or budget.
2. Use United Way funds only for the activities outlined in the approved proposal.
 - Note: The following expenses are ineligible under the terms of this agreement: retirement of debts or budget deficits; expenses related to construction or the development of facilities; participant or client wage subsidies or honoraria.
3. Maintain responsible management guided by a volunteer Board of Directors.
4. Attend sessions as needed on the benefits and expectations of this funding agreement.
5. Participate in community efforts and initiatives to advance the strategies related to the priority goals where appropriate.
6. Allow United Way staff and volunteers to visit the program site at times mutually agreed to in advance, and when feasible. This could include providing opportunities for United Way HPE staff to present to your board members or staff.

Reporting Policy

«Agency Name» agrees to:

7. Provide progress report(s) describing activities and measurement (using provided templates) at least once per annum. This can be completed as either part of a subsequent annual funding request or if no further funding application is submitted, then as a separate final report at the end of the funding period. Please note that

United Way HPE reserves the right to request interim progress reports, board meeting minutes, and finance reports, at any point during the funding period.

8. Report any anticipated unspent program dollars to the Director, Community Investment at United Way HPE before December 15th of each year of the funding term.
9. Notify United Way of any major organizational or programmatic changes. This includes reductions in outputs and number of clients served.
10. Funds can only be used to support organizational capacity of the agency or the program they were intended for. Funding can only be used for aspects of the agency or program that were approved through United Way's assessment process. Immediately report if your program/project is no longer in operation, postponed, or suspended temporarily.
11. Immediately report if your Canadian charitable status (and/or sponsor's status) changes.
12. Notify United Way of the date, time and location of your Annual General Meeting when it is confirmed and submit audited statements.

Agency Conduct and Activities:

This Policy is intended to provide guidance around funded agency employee, board, and other volunteer conduct, conflict of interest, and adherence to applicable regulations. The private conduct of each employee and volunteer is a personal matter except when such conduct compromises the reputation, image, or integrity of «Agency_Name» and/or United Way HPE.

«Agency Name» agrees to:

13. Acquaint themselves with UWHPE's mission, vision, values, principles, and policies, and behave accordingly. Not participate in, condone, or engage in dishonesty, fraud, deceit, misrepresentation or illegal activities. Protect the reputation, image, and integrity of the funded program/agency, and United Way HPE. Potential or existing risks to reputation need to immediately be flagged for review by United Way HPE as they arise.
14. Avoid any conflict of interest or perceived conflict of interest. A conflict of interest is any situation where personal interest (such as financial gain, family relationships, etc.) appear to conflict, or could potentially conflict with the interests of the funded program. Any new or existing conflicts or potential conflicts need to immediately be flagged for review by United Way HPE as they arise.
15. Provide program delivery in compliance with all applicable federal, provincial and municipal laws, by-laws and regulations, including but not limited to any environmental legislation, human rights codes, legislation related to protection of information and privacy, and Public Health regulations. The funded program shall obtain, prior to the commencement of the program, all required permits, licenses, consents, and other authorizations necessary to run the program.

Agency Qualifications

«Agency Name» confirms that:

16. The organization aligns with the United Way of Hastings & Prince Edward's Community Impact Strategy.
17. The organization is a qualified donee under Canada Revenue Agency. To learn what a qualified donee is visit this link: <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/qualified-donees.html>
18. The organization will use the provided funding for services to residents within Hastings County and/or Prince Edward County only.
19. The organization will maintain accurate financial and accounting records, and use budgetary controls and accepted best practices in internal financial control, including regular reports to the board

20. If and when requested, the organization will submit independently produced, local (within HPE) audited annual financial statements or review engagement prepared by an independent licensed public accountant in compliance with Generally Accepted Accounting Practices as applied to non-profit organizations.
21. The organization has and maintains a balanced budget, or the board is aware of the deficit budget and has a plan for meeting all deficits.
22. The organization is governed by an active Board of Directors that serves in a voluntary capacity, with regular meetings, and is responsible for developing the organization's mission and strategic direction.
23. The organization has and follows its bylaws that state the purpose of the organization, make provisions for the size of Board of Directors and provide rules for selection, terms, number of officers and committees, financial and legal procedures, conflict of interest and quorum requirements.
24. The Board oversees the recruitment and ongoing management of the Executive Director/CEO.
25. The organization complies with the Ontario Human Rights Code in its service delivery, employment practices and volunteer board leadership. The organization agrees that they do not weaken or limit the ability to exercise rights legally protected in Canada.

These include restricting access to programs or services, or employment, or otherwise discriminatory, contrary to applicable laws, on the basis of prohibited grounds, including gender, race, colour, national or ethnic origin, mental or physical disability, sexual orientation, or gender identity or expression; advocating for intolerance, discrimination and/or prejudice; and/or actively working to undermine or restrict a woman's access to sexual and reproductive health services.
26. This organization aligns with United Way Hastings & Prince Edwards mission, vision and values statements and with the guiding principles.
27. This organization agrees to adhere to the United Way Hastings & Prince Edward Community Impact Fund Investment Guidelines including all applicable UWHPE policies and ongoing reporting requirements.
28. United Way HPE is unable to support requests made by individuals, hospitals, medical research and treatment facilities, the arts, programs that advance religion in the delivery of the proposed United Way funded program or service, cultural or political institutions.

United Way HPE funding requests cannot be used towards foundations, unions, professional associations, or organizations that are primarily fundraisers, capital campaigns and/or endowments.
29. The organization has appropriate insurance for the organization. ie. Board and Liability insurance.

Marketing Support and Brand Standards Policy

«Agency Name» agrees to:

30. Partner with United Way throughout the year to support marketing and content materials as well as outreach activities by providing access to the program delivery site(s) and/or a contact person(s) as appropriate for content such as, United Way's Story Bank, Seeing is Believing tours, Speaker's Bureau, Day of Caring days, and other engagement programs that help to demonstrate our work together in the community.
31. Assist United Way HPE in highlighting your successes to our community by tagging us when posting to social media about the program(s) for which you received support from United Way HPE.
32. Participate in donor recognition initiatives such as thank you cards and notes to donors as appropriate, thereby making a tangible connection between donations to United Way HPE and changed lives in the community
33. Partner with United Way HPE by following us on social media and sharing our content.
34. Portray United Way positively in all public communications.
35. Protect United Way HPE's brand identity by following brand and logo usage guidelines. Current logos and usage guidelines are available upon request, please contact acooke@unitedwayhpe.ca

Public Recognition Policy

«Agency Name» agrees to:

36. Acknowledge United Way HPE funding in media releases, media interviews, annual reports, newsletters, social media activities, videos and promotional materials, both online and in print.
37. Recognize United Way HPE's support at your events. Ensuring you have our pull-up banner and/or promotional materials on display.
38. Display United Way HPE's logo in your reports, newsletters, marketing materials, and social media posts for the program. This includes putting our logo on your website. The recipient must ensure that they are displaying the United Way Hastings & Prince Edward logo in accordance with current brand standards.
39. Display United Way HPE's logo at your location in a high traffic area such as your reception or meeting rooms. We will provide window decals to be mounted. If you do not have one, please request through acooke@unitedwayhpe.ca

Fundraising Blackout Policy

«Agency Name» agrees to:

40. Adhere to United Way HPE's fundraising blackout period policy as described below:

Premise

The United Way HPE campaign operates on the premise that donors prefer a federated solicitation rather than multiple asks. During the months of September, October and November of each year, United Way HPE is conducting its annual campaign on behalf of the not-for-profit sector in Hastings and Prince Edward Counties.

Recognizing this, the Supplemental Fundraising Agreement enhances the United Way campaign while addressing the fundraising and public relations needs of Agencies. The ultimate goal of this policy is to maximize the funds available to funded partners so they can provide services to people in our community.

Policy

No major or extraordinary fundraising activities, as listed below, raising in excess of \$2,500 gross shall be sanctioned during the months of September, October and November (Blackout Period). Violation of this policy will result in an equivalent deduction from future installments and possibly a termination of the funding agreement.

- Solicitation of corporations for cash or in-kind donations, or sponsorship of events.
- Direct mail or mass telephone solicitations to the general public, including second party solicitations (e.g. Hydro inserts, flyers with newspapers)
- Major Special events such as dinners, Monte Carlos, dances, golf tournaments or benefit performances.
- Events soliciting pledges such as telethons, "walkathons", runs.
- Capital campaigns - to acquire real estate, repair or construct buildings and related facilities; the acquisition of or major repairs to significant items of equipment or furnishings.

Advertising/promotion in the months of September, October and/or November for events that occur outside of the blackout period should be limited

Note: If you have any questions about the blackout period or proper logo to use on any of your materials, please contact us at acooke@unitedwayhpe.ca or 613-962-9531 for assistance.

C. «Agency Name» and United Way HPE agree that:

1. United Way may terminate this agreement upon becoming aware that is or has been in breach of any of the terms and conditions of this agreement.
2. United Way or the funded partner is welcome to request a meeting with the other at any time throughout this funding agreement.

Note: Any failure to adhere to the above-described conditions, policies, and deadlines may result in an immediate hold on any future funding installments until such time as the conditions are satisfied and deadlines are met.

Expiration of the Agreement

- At the end of this agreement, unless a new agreement is approved following a Request for Proposal process, there shall be no continuation of funding.
- Should there be any changes to the terms, conditions or amounts listed above, United Way HPE may put a new agreement or amendment in place, which will supersede this agreement.